COLLEGE AID PLANNERS
FAFSA ~ Tax ~ Retire

For the most effective meeting, please have the following available:

Information Needed for a College Planning Meeting

INCOME RELATED:

- ☐ Federal tax returns
- ☐ Parent's W-2, Spouses's W-2 & Student's W-2
- ☐ Child support payments made or received
- ☐ Social Security benefits received

ASSET RELATED:

- ☐ Current value of parent's & student's savings (checking accounts, savings accounts, CDs, etc.)
- ☐ Current value of parent's & student's investments (stocks, bonds, mutual funds, 529 plans, etc.)
- ☐ Current value of retirement assets (401k, IRA, 403b, pension, etc.)
- ☐ Purchase price of home, year purchased, mortgage balance, home equity balance, mortgage payment
- ☐ Value of other real estate owned, mortgage balance, year purchased, and original purchase price

Information Needed for Retirement Meeting

- ☐ Copy of current retirement statements (401k, IRA, 403b, pension, etc.)
- ☐ Copy of non-retirement assets (bank account, mutual funds, stocks, bonds, real estate & etc.)

Information Needed for Tax Meeting

- ☐ Current tax documents (W-2s, 1099s, 1098s, charitable contributions, etc.)
- ☐ Copy of previous year's federal and state tax returns (new clients only)
- ☐ Name, date of birth and SSN for all dependents (new clients only)

New client? Please complete the CLIENT INFORMATION FORM that follows